

TRUSTEE APPLICATION OVERVIEW

STEP ONE

Use the link in the trustee invitation email to register for the site. Once registered you will be brought to the Trustee Application Form. As you move through the application click **CONTINUE** to move from section to section. At any point you may click **SAVE AS DRAFT** to save your work for later and exit the application.

Trustee Application Form

The screenshot shows a web interface for the Trustee Application Form. At the top, there are five tabs: STEP 1: INTRODUCTION (active), STEP 2: PRIVATE INFO, STEP 3: PUBLIC INFO, STEP 4: COMMITMENTS, and STEP 5: REVIEW. Below the tabs, the main content area is titled "Introduction : Welcome to the Trustee Application Form" and includes a "Save As Draft" button. The text reads: "Want to be a trustee? Let's get started!" followed by "Things you should know:" and a bulleted list of instructions. A "Continue" button is centered at the bottom of the form.

STEP 1: INTRODUCTION STEP 2: PRIVATE INFO STEP 3: PUBLIC INFO STEP 4: COMMITMENTS STEP 5: REVIEW

Introduction : Welcome to the Trustee Application Form Saved at 2013-06-18 10:08:58 EDT Save As Draft

Want to be a trustee? Let's get started!

Things you should know:

- The details in the Private information section will never be shared publicly. The information you provide in the Public section will be visible to anyone who visits the Kiva Zip website.
- You can save a draft and come back to this form at any time. The application will also auto-save fairly frequently.
- Please make sure your answers are thorough, specific, appropriate, and accurate. The application should help lenders understand your organization, and why it is suited to be a trustee.
- You will have a chance to preview what your profile will look like before you submit your application.

Continue

LOGIN INFO

User Name (Email):

Password:

STEP TWO: PRIVATE INFO

Enter Your Organization's Address:

Address

Address, continued

City/County

Country

State/Province/Region

Zip/Postal Code

STEP THREE: PUBLIC INFO

There are three stages involved in filling out the public information portion of the application.

PART ONE: DESCRIPTION AND IMPACT

In this section, we ask for some basic information as well as for a bit more context on your organization's mission and history, and why you want to be a trustee on Kiva Zip.

NAME OF YOUR ORGANIZATION

ORGANIZATION TYPE

WEBSITE (OPTIONAL)

LINKEDIN PROFILE (OPTIONAL)

FACEBOOK PROFILE (OPTIONAL)

TWITTER PROFILE (OPTIONAL)

WHY ARE YOU INTERESTED IN BECOMING A TRUSTEE?

Please refrain from mentioning specific Borrowers in your answer, even if you are hoping to become a Trustee to help a specific person. For example: I am hoping to create opportunities for people, rather than I am hoping to create opportunities for Michael. Please write between 50 and 100 words.

WHAT IS THE MISSION OF YOUR ORGANIZATION?

Describe the mission of your organization. Feel free to include any details that pertain to how using Kiva Zip to support your clients will help you fulfill your mission. Please write between 50 and 100 words.

IN THE PAST, HOW EFFECTIVE HAVE YOU BEEN IN ACHIEVING THIS MISSION?

What indicators/ metrics do you use to evaluate your impact? Please write between 50 and 100 words.

DO YOU BELONG TO ANY ORGANIZATIONAL NETWORKS -- NATIONALLY, REGIONALLY, OR LOCALLY? IF YES, PLEASE LIST.

PART TWO: DUE DILIGENCE

In this section, we want to find out a little bit more about how your organization will choose borrowers and ensure that they are suitable candidates for a loan.

This is a key section that will help lenders decide whether they want to make a loan to the borrowers you will endorse, so you should put effort into ensuring that your answers are specific, detailed and thorough.

HOW WILL YOU DECIDE WHO TO ENDORSE AS A BORROWER? WHAT DUE DILIGENCE WILL YOU CONDUCT?

Generally, what will be the nature of your relationship with the potential borrowers? In your due diligence, what will you check for, and how? Please be specific, detailed and thorough. Please write between 50 and 200 words.

HOW DO YOU PLAN TO SUPPORT THE BORROWER, BOTH BEFORE AND AFTER THE LOAN IS DISBURSED?

What other assistance do you plan to provide to borrowers you endorse (business, financial, technical, etc.)? Please be specific, detailed and thorough. Please write between 50 and 200 words.

HOW WILL YOU HELP US ENSURE THAT THE LOANS YOU ENDORSE HAVE A SIGNIFICANT AND POSITIVE SOCIAL IMPACT?

What types of borrowers, or loans, will you endorse? What is the impact you hope the loans will have, both on the borrower and also his/her community? Please be specific, detailed and thorough. Please write between 50 and 200 words.

PART THREE: PHOTO

A photo is **one of the most important** things that will attract lenders to a profile. A few best practices:

- ✓ Organization logos are acceptable and should be high resolution
- ✓ If you use a photo of staff it is wonderful when everyone is smiling and or doing something related to the organization's activities.
- ✓ **Just Remember:** Photos should have a high resolution

STEP FOUR: COMMITMENTS (TRUSTEE AGREEMENT)

This is the Trustee Agreement, which we ask all of our Trustees to sign. It sets out the terms of participation in the Kiva Zip project for Trustees. It is very important that you read this document, and understand the commitments you are entering into. If you have any questions about anything contained in this agreement, you can email us at contactZip@kiva.org.

You can sign it electronically online.

STEP FIVE: REVIEW

Review all information to insure it is correct and submit the application.

REMEMBER some of the information is public. You should think about how a lender would perceive your responses, and ask yourself, "If I was a lender, would I fund a loan endorsed by this trustee?".

AFTER YOU SUBMIT THE APPLICATION YOU WILL RECEIVE AN EMAIL APPROVING YOUR APPLICATION AND ENCOURAGING YOU TO ENDORSE A BORROWER. IF YOU HAVE ANY QUESTIONS PLEASE CONTACT YOUR KIVA FELLOW, A KIVA STAFF MEMBER, OR CONTACTZIP@KIVA.ORG.
